Project Documentation Naming Conventions and Repository Guideline

Purpose

The purpose of the Project Documentation Naming Conventions and Repository Guideline is to establish project documentation naming standards and structure for project documentation repositories. This guideline is intended to help the project manager organize the project notebook by providing a simple set of rules for creating and storing project documentation, and illustrates the application of these rules to a sample project.

Approach

Two important components of any Project Management Repository (PMR) are a standard project repository structure and standard project naming conventions. Other important components of a PMR include the physical repository (file store or database), as well as, the processes related to creating, managing, and archiving the project management documentation.

A project documentation repository supported by an **established project repository structure (taxonomy**) provides an area for creating, managing, and archiving project management data and documents for a specific project. It enables the project team to work together in an efficient manner, and supports re-use of data and documents in executing project management practices on future projects.

Project naming conventions include a standard format for the name and unique identification of each project, and standard identification for each project deliverable. The naming conventions also include version control attributes for both project management and software development (engineering) documentation.

Project naming conventions and a project repository structure provide a number of benefits that are important for improving project management practices. Specifically, they enhance:

- ✓ Project team communication

- ✓ Project management efficiency

- ✓ Project documentation management

- ✓ Configuration Management of project deliverables

- ✓ Project orientation for new team members

Project Classes

Projects are classified as Class A, Class B, or Class C using the Project Classification Criteria template. The project classification criteria are:

- Impact on Citizens, Operations, and Agencies
- Visibility
- Impact of Not Completing the Project
- Maturity of Technology
- Agency Project Management Capability

A complete explanation of project classification can be found in the PM Guide, PM Handbook, SD Handbook, or Project Classification Criteria template.

Class A and Class B Projects – Project Repository Structure

For Class A and Class B projects, the project manager and team use the Software Development Project Handbook or the PM Handbook as a reference for executing each project. For the Class A and Class B projects, the project team creates and manages a significant number of project deliverables to maintain adequate control of the project. For these projects, the project manager should consider establishing a project repository that is aligned with the methodologies and required deliverables. Table 2 provides an overview of a recommended project repository structure for Class A and Class B projects. The project repository structure includes a reference Work Breakdown Structure (WBS) ID that is matched to schedule and cost information, folder name, and associated project documents/deliverables.

Table 2. Project Repository Structure – Class A and B Projects

| WBS ID	Folder and Sub-Folder Name	Documents
1	Project [Name]	▪ Project Name
1.1	Concept	▪ Project Initiation Document (PID) ▪ Concept Analysis Document (CAD)
1.2	Requirements	▪ Software Requirements Specification (SRS) ▪ Requirements Traceability Matrix (RTM) ▪ Use Cases ▪ Support Expectations ▪ Technical Evaluation ▪ Requirements Walkthrough ▪ Systems Diagram
1.3	Design	▪ High Level Design Document ▪ Detailed Design Documents

WBS ID	Folder and Sub-Folder Name	Documents
		▪ Design Walkthroughs
1.4	Development	▪ Code Walkthrough
1.5	Testing	▪ Test Plan
		▪ Defects Tracking Log
		▪ Acceptance Test
		▪ Final Test Report
1.6	Documentation and Training	▪ Training Plan
		▪ Documentation Plan
		▪ Standard Documentation Evaluation Form
1.7	Deployment	▪ System/Application Support
		▪ Deployment Strategy and Plan
		▪ Release Readiness Review
		▪ Installation Test
		▪ Initial Release Final Report
		▪ Deliverables Acceptance Form
		▪ Support Interaction Final Report
1.8	Project Management	▪ Project Initiation Document
		▪ Management Approaches
		▪ Communication Matrix
		▪ Project Closeout Report
		▪ Client Satisfaction Survey
1.81	Change Control	▪ Request for Change
		▪ Change Log
1.82	Contracts	▪ Contractual Agreements
		▪ Legal Documents
1.83	Costs and Justification	▪ Business Case
		▪ Project Funding Form
		▪ Project Budget
		▪ Project Budget Report
1.84	Meetings & Memos (client, team, steering committee, etc.)	▪ Agenda and Notes

WBS ID	Folder and Sub-Folder Name	Documents
1.85	Project Logs	▪ Risk and Response Log ▪ Lessons Learned ▪ Issues Log
1.86	Project Team	▪ Team Member Evaluation ▪ Project Organizational Chart ▪ Project Survey
1.87	Schedule	▪ Project Schedule ▪ WBS ▪ Project Timeline
1.88	SCM (Software Configuration Management)	▪ SCM Plan
1.89	Status Reports	▪ Project Status Report ▪ Team Member Status Report ▪ Executive Status Report ▪ Quarterly Operations Review

The project manager should use the information contained in the above table to create a project folder for each project. The project manager should create a project folder on a shared drive and/or as a shared folder to establish a project repository for the project team. Other options may include web site or version control type software. The following is an example of a shared folder that may be created for a project.
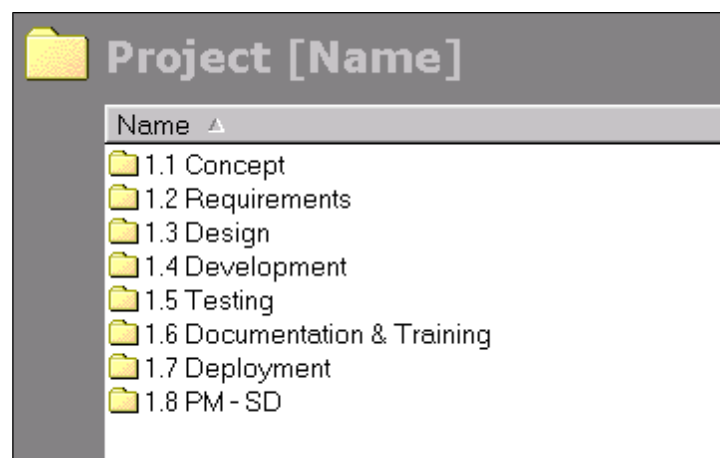

Class A and B Project Documentation – Taxonomy

The project manager should consider creating sub-folders within the main project folder that correspond to the WBS structure. Project documents associated with each WBS item would be managed and stored within the corresponding sub-folder. For example, all test documents regardless of when they are initiated in the project life cycle, would be managed in the folder designated as 1.5 Testing.

To further organize and manage software development and project management deliverables for each project, the project manager should consider sub-dividing the folder designated as 1.8 PM – SD (Project Management and Software Development practices) into a number of sub-folders. The following chart provides a suggested structure for the sub-folders. The project manager and project team may then use the sub-folders for organizing and managing the deliverables identified by WBS 1.81 – 1.89 listed in Table 1.
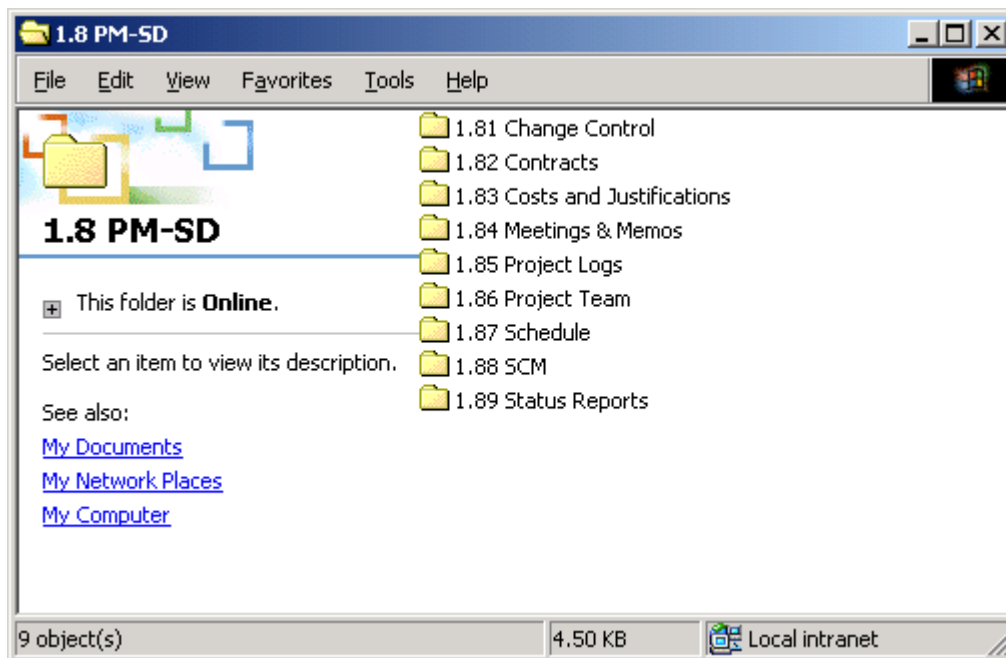
Project Management - Software Development Practices Taxonomy

Class C Projects – Project Repository Structure

For Class C Projects the project manager and project team typically manage project activities less formally, requiring a smaller number of project deliverables and less structure in the project repository. It is important to note however, that although Class C projects are smaller or less critical, the project manager should still manage the project using the principles and practices outlined in the PM Guide and handbooks. For these smaller projects, a checklist has been provided which summarizes the important activities and deliverables that are required of the project manager and team.

Table 3 provides an overview of a recommended project repository structure for Class C projects and includes a folder name and the types of associated project documents/deliverables.

Table 3. Project Repository Structure – Class C Projects

Folder or Sub-Folder Name	Description	Documents
Project [Name]	Main folder containing project information. Project's name appears on folder.	▪ Project Name
Project Plans	Sub-folder containing information used in project planning.	▪ Business Case ▪ Budget ▪ Organization Chart
Requirements	Sub-folder that contains requirements, design, and development information.	▪ Requirements Documents ▪ Design Documents
Deployment	Sub-folder that contains testing, documentation and training, deployment, and support information.	▪ Test Plans ▪ Deployment Plans ▪ Documentation and Training Plans ▪ Release Readiness Review
Project Management-Software Development (PMSD)	Sub-folder that contains information required to manage and control the project.	▪ Schedule ▪ Risk Documents ▪ Issues Tracking ▪ Cost Tracking ▪ Time Tracking ▪ Change Control ▪ Project Closeout

The project manager should use the information contained in the above table to create a project folder for each Class C project. The project manager should create a project folder on a shared drive and/or as a shared folder to establish a project repository for the project team. The following is an example of a shared folder that may be created for Class C projects.
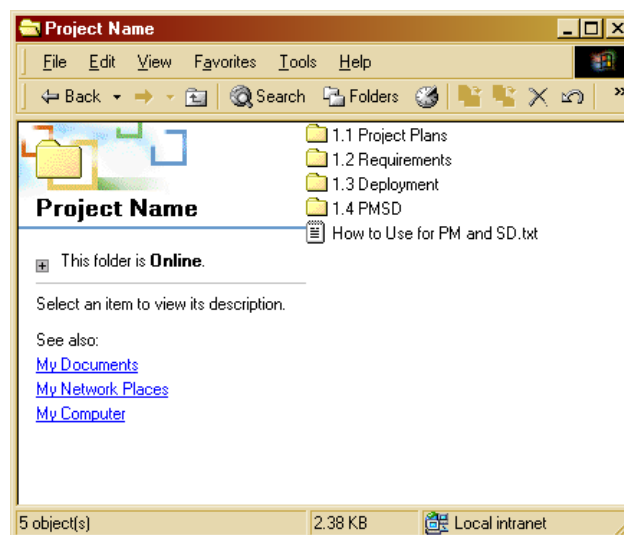

Class C Project Repository Taxonomy

Project Naming Conventions

The organization has adopted a set of standard naming conventions for projects and associated project deliverables. The project manager should consider adopting these standards for each project, which will help in organizing project information; facilitate the sharing of information between projects and aid in searching and retrieving historical information.

The naming convention for project deliverables includes the document designation, abbreviated project name, preparation date of the document for version control, and the standard (3- letter text) extension associated with the software program used to create the document. The following illustrates the standard naming convention for a Software Requirements Specification, created as a Microsoft Word Document, for the SCORE project on October 21, 2001.
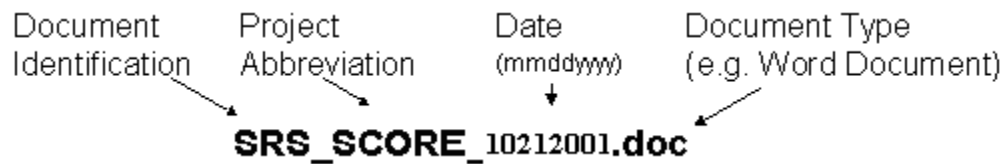
The original template for the (above) illustrated project document was **Temp_SRS** or **Blank_SRS** (if a blank template was used). To create the project document designation, the project manager or team member should modify the original template as follows:

1. **Delete the "Temp" designation and the first underscore (_) associated with each template.**

2. **Insert an underscore (_) and the project abbreviation after the document identification.**

3. **Insert an underscore (_) and the date (in mmddyyyy format) the document was created following the project abbreviation.**

For further elaboration, the appendix of this document provides a list of all the potential project documents. This table includes the initial template name designation, project naming convention, and an example illustrating how the naming convention should be applied to a project.

Summary

A standard project repository and project naming conventions help the project manager and project team to organize and share information efficiently. Additionally, standardization of a project repository structure and project naming conventions will help organizations establish an effective PMR, archive project information, and use this information as input or a starting point for future project documents.

References and Related Guideline

Project Management Body of Knowledge (PMBOK 2000 Edition)

- ✓ Project Integration Management

Appendix - Naming Conventions and Examples

Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Acceptance Test	• Temp_AcceptanceTesting.doc • Blank_AcceptanceTesting.doc • Ex_AcceptanceTesting.doc	AcceptanceTesting_SCORE_10212004.doc
Business Case	▪ Temp_BusinessCase.doc ▪ Blank_ BusinessCase.doc • Ex_BusinessCase.doc	BusinessCase_SCORE_10212004.doc
Change Log	▪ Temp_ChangeLog.xls ▪ Blank_ChangeLog.xls • Ex_ChangeLog.xls	ChangeLog_SCORE_10212004.xls
Client Satisfaction Survey	▪ Temp_ClientSatisfactionSurvey.doc ▪ Blank_ ClientSatisfactionSurvey.doc ▪ Ex_ ClientSatisfactionSurvey.doc	ClientSatisfactionSurvey_SCORE_10212004.doc
Communications Matrix	▪ Temp_CommunicationsMatrix.doc ▪ Blank_ CommunicationsMatrix.doc • Ex_CommunicationsMatrix.doc	CommunicationsMatrix_SCORE_10212004.doc
Concept Analysis Document (CAD)	▪ Temp_ConceptAnalysisDocument.doc ▪ Blank_ConceptAnalysisDocument.doc • Ex_ConceptAnalysisDocument.doc	ConceptAnalysisDocument_SCORE_10212004.doc

Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Defect Tracking Log	- Temp_DefectTrackingLog.xls - Blank_DefectTrackingLog.xls - Ex_DefectTrackingLog.xls	DefectTracking_SCORE_10212004.xls
Deliverables Acceptance	- Temp_DeliverablesAcceptance.doc - Blank_DeliverablesAcceptance.doc - Ex_DeliverablesAccpetance.doc	DeliverablesAcceptance_SCORE_10212004.doc
Deployment Strategy and Plan	- Temp_DeploymentStrategyAndPlan.doc - Blank_DeploymentStrategyAndPlan.doc - Ex_DeploymentStrategyAndPlan.doc	DeploymentStrategyAndPlan_SCORE_10212004.doc
Documentation Plan	- Temp_DocumentationPlan.doc - Blank_DocumentationPlan.doc - Ex_DocumenationPlan.doc	DocumentationPlan_SCORE_10212004.doc
Executive Status Report	- Temp_ExecutiveStatusReport.doc - Blank_ExecutiveStatusReport.doc - Ex_ExecutiveStatusReport.doc	ExecutiveStatusReport_SCORE_10212004.doc
High Level Design	- Temp_HighLevelDesign.doc - Blank_HighLevelDesign.doc - Ex_HighLevelDesign.doc	HighLevelDesign_SCORE_10212004.doc
Implementation Strategy and Plan	- Temp_ImplementationStrategyAndPlan.doc - Blank_ImplementationStrategyAndPlan.doc - Ex_ImplementationStrategyAndPlan.doc	ImplementationStrategyAndPlan_SCORE_10212004.doc

Project Documentation Naming Conventions and Repository Guideline

Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Initial Release - Final Report	• Temp_InitialReleaseFinalReport.doc • Blank_InitialReleaseFinalReport.doc • Ex_InitialReleaseFinalReport.doc	InitialReleaseFinalReport_SCORE_10212004.doc
Installation Test	▪ Temp_InstallationTest.doc ▪ Blank_InstallationTest.doc • Ex_InstallationTest.doc	InstallationTest_SCORE_10212004.doc
Issues Log	▪ Temp_IssuesLog.xls ▪ Blank_ IssuesLog.xls • Ex_IssuesLog.xls	IssuesLog_SCORE_10212004.xls
Lessons Learned	▪ Temp_LessonsLearned.xls ▪ Blank_LessonsLearned.xls • Ex_LessonsLearned.xls	LessonsLearned_SCORE_10212004.xls
Meeting Agenda	▪ Temp_MeetingAgenda.doc ▪ Blank_MeetingAgenda.doc • Ex_MeetingAgenda.doc	MeetingAgenda_SCORE_10212004.doc
Meeting Notes	▪ Temp_MeetingNotes.doc ▪ Blank_MeetingNotes.doc • Ex_MeetingNotes.doc	MeetingNotes_SCORE_10212004.doc
Project Budget	▪ Temp_ProjectBudget.xls ▪ Blank_ProjectBudget.xls • Ex_ProjectBudget.xls	ProjectBudget_SCORE_10212004.xls

Project Documentation Naming Conventions and Repository Guideline

Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Project Closeout Report	▪ Temp_ProjectCloseoutReport.ppt ▪ Blank_ProjectCloseoutReport.ppt • Ex_ProjectCloseoutReport.ppt	ProjectCloseoutReport_SCORE_10212004.ppt
Project Initiation Document (PID)	▪ Temp_ProjectInitiationDocument.doc ▪ Blank_ProjectInitiationDocument.doc • Ex_ProjectInitiationDocument.doc	ProjectInitiationDocument_SCORE_10212004.doc
Project Organizational Chart	▪ Temp_OrganizationalChart.ppt ▪ Blank_OrganizationalChart.ppt • Ex_OrganizationalChart.ppt	OrganizationalChart_SCORE_10212004.ppt
Project Phase Kickoff Presentation	▪ Temp_ProjectPhaseKickoffPresentation.ppt • Blank_ProjectPhaseKickoffPresentation.ppt • Ex_ProjectPhaseKickoffPresentation.ppt	ProjectPhaseKickoffPresentation_SCORE_10212004.ppt
Project Schedule – Generic (Excel)	▪ Temp_GenericSchedule.xls ▪ Blank_GenericSchedule.xls ▪ Ex_GenericSchedule.xls	GenericSchedule_SCORE_10212004.xls
Project Schedule – Generic (MS Project)	▪ Temp_GenericSchedule.mpp ▪ Blank_GenericSchedule.mpp • Ex_GenericSchedule.mpp	GenericSchedule_SCORE_10212004.mpp
Project Schedule – Spiral (Excel)	▪ Temp_SpiralSchedule.xls ▪ Blank_SpiralSchedule.xls • Ex_SpiralSchedule.xls	SpiralSchedule_SCORE_10212004.xls

Project Documentation Naming Conventions and Repository Guideline

Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Project Schedule – Waterfall (Excel)	▪ Temp_WaterfallSchedule.xls ▪ Blank_WaterfallSchedule.xls ● Ex_WaterfallSchedule.xls	WaterfallSchedule_SCORE_10212004.xls
Project Schedule – Waterfall (MS Project)	▪ Temp_WaterfallSchedule.mpp ▪ Blank_WaterfallSchedule.mpp ● Ex_WaterfallSchedule.mpp	WaterfallSchedule_SCORE_10212004.mpp
Project Status Report	▪ Temp_ProjectStatusReport.doc ▪ Blank_ProjectStatusReport.doc ● Ex_ProjectStatusReport.doc	ProjectStatusReport_SCORE_10212004.doc
Project Survey	▪ Temp_ProjectSurvey.doc ▪ Blank_ProjectSurvey.doc ● Ex_ProjectSurvey.doc	ProjectSurvey_SCORE_10212004.doc
Quarterly Operations Review	▪ Temp_QuarterlyOperationsReview.ppt ▪ Blank_QuarterlyOperationsReview.ppt ● Ex_QuarterlyOperationsReview.ppt	QuarterlyOperationsReview_SCORE_10212004.ppt
Release Readiness Review	▪ Temp_ReleaseReadinessReview. doc ▪ Blank_ReleaseReadinessReview.doc ● Ex_ReleaseReadinessReview.doc	ReleaseReadinessReview_SCORE_10212004.doc
Request for Change	▪ Temp_RequestForChange.doc ▪ Blank_RequestForChange.doc ● Ex_RequestForChange.doc	RequestForChange_SCORE_10212004.doc

Project Documentation Naming Conventions and Repository Guideline

Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Requirements Specification (Non-software Projects)	▪ Temp_RequirementsSpecification.doc ▪ Blank_RequirementsSpecification.doc • Ex_RequirementsSpecification.doc	RequirementsSpecification_SCORE_10212004.doc
Requirements Traceability Matrix	▪ Temp_ReqTraceabilityMatrix.xls ▪ Blank_ ReqTraceabilityMatrix.xls • Ex_ReqTraceabilityMatrix.xls	ReqTraceabilityMatrix_SCORE_10212004.xls
Requirements Walkthrough	▪ Temp_RequirementsWalkthrough.xls ▪ Blank_RequirementsWalkthrough.xls • Ex_RequirementsWalkthrough.xls	RequirementsWalkthrough_SCORE_10212004.xls
Risk Assessment Tool	▪ Temp_RiskAssessmentTool.xls ▪ Blank_RiskAssessmentTool.xls • Ex_RiskAssessmentTool.xls	RiskAssessmentTool_SCORE_10212004.xls
Risk and Response Log	▪ Temp_RiskAndResponseLog.xls ▪ Blank_RiskAndResponseLog.xls • Ex_RiskAndResponseLog.xls	RiskAndResponseLog_SCORE_10212004.xls
Software Requirements Specification (Access Database)	• Temp_SRS.mdb	SRS_SCORE_10212004.mdb
Software Requirements Specification (Excel Document)	▪ Temp_SRS.xls ▪ Blank_SRS.xls • Ex_SRS.xls	SRS_SCORE_10212004.xls

Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Software Requirements Specification (Word Document)	▪ Temp_SRS.doc ▪ Blank_SRS.doc • Ex_SRS.doc	SRS_SCORE_10212004.doc
Standard Documentation Evaluation Form	• Temp_StandardDocEvaluationForm.doc • Blank_StandardDocEvaluationForm.doc • Ex_StandardDocEvaluationForm.doc	StandardDocEvaluationForm_SCORE_10212004.doc
Steering Committee Presentation	▪ Temp_SteeringCommitteePresentation.ppt ▪ Blank_SteeringCommitteePresentation.ppt ▪ Ex_SteeringCommitteePresentation.ppt	SteeringCommitteePresentation_SCORE_10212004.ppt
Support Expectations	▪ Temp_SupportExpectations.doc ▪ Blank_SupportExpectations.doc • Ex_SupportExpectations.doc	SupportExpectations_SCORE_10212004.doc
Support Interaction Final Report	▪ Temp_SupportInteractionFinalRpt.doc ▪ Blank_SupportInteractionFinalRpt.doc • Ex_SupportInteractionFinalRpt.doc	SupportInteractionFinalRpt_SCORE_10212004.doc
System/Application Support	▪ Temp_SystemApplicationSupport.doc ▪ Blank_SystemApplicationSupport.doc ▪ Ex_SystemApplicationSupport.doc	SystemApplicationSupport_SCORE_10212004.doc
Systems Diagram	▪ Temp_SystemDiagram.xls ▪ Blank_SystemDiagram.xls • Ex_SystemDiagram.xls	SystemDiagram_SCORE_10212004.xls

Project Documentation Naming Conventions and Repository Guideline

Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Team Member Evaluation	• Temp_TeamMemberEvaluation.doc • Blank_TeamMemberEvaluation.doc • Ex_TeamMemberEvaluation.doc	TeamMemberEvaluation_SCORE_10212004.doc
Team Member Status Report	▪ Temp_TeamMemberStatusReport.doc ▪ Blank_TeamMemberStatusReport.doc • Ex_TeamMemberStatusReport.doc	TeamMemberStatusReport_SCORE_10212004.doc
Technical Evaluation	▪ Temp_TechnicalEvaluation.doc ▪ Blank_TechnicalEvaluation.doc • Ex_TechnicalEvaluation.doc	TechnicalEvaluation_SCORE_10212004.doc
Test Plan (Master)	▪ Temp_TestPlanMaster.doc ▪ Blank_TestPlanMaster.doc • Ex_TestPlanMaster.doc	TestPlanMaster_SCORE_10212004.doc
Test Plan (Minor)	▪ Temp_TestPlanMinor.doc ▪ Blank_TestPlanMinor.doc • Ex_TestPlanMinor.doc	TestPlanMinor_SCORE_10212004.doc
Timeline	▪ Temp_Timeline.ppt ▪ Blank_Timeline.ppt • Ex_Timeline.ppt	Timeline_SCORE_10212004.ppt
Training Plan Not Developed (Does Linda Knecht have this?)	• Temp_TrainingPlan.doc • Blank_TrainingPlan.doc • Ex_TrainingPlan.doc	TrainingPlan_SCORE_10212004.doc

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Project Documentation/ Deliverable	Template Name (These are the document names that will be found on the web site if the user attempts to download a template with instructions, blank template, or example template.)	Project Documentation Example (This is the naming scheme that a user should use when naming a template that will be stored in their project repository)
Use Case	• Temp_UseCase.doc • Blank_UseCase.doc • Ex_UseCase.doc	UseCase_SCORE_10212004.doc